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Jeanne Long
Congressional Inform. Serv.
4520 East-West Hwy, Suite 800
Bethesda, MD
20014

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Special Report *Newspaper art has been revolutionized. Brushes and pens are being set aside in favor of the almost ubiquitous Macintosh personal computer. The people in the art department are changing, too. They used to be photo retouchers and illustrators with a flair for drawing. Now they are "graphics journalists" who are as much at ease in news reporting as they are in artistic work. Although the changes in newspaper art have been most dramatic in newsrooms, advertising and promotion departments also have been affected—and will be even more so in the future.* **20**

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CHAIRMAN'S CORNER

The nation's diversity is reflected in its newspapers

I am consistently amazed by the number of apparently intelligent journalists who seek to become columnists. Here I am only 10 months into the profession and already I feel an intense desire to repeat myself. This is not because I believe that what I previously wrote was so earth shattering, but because, as with Christmas shopping, I have delayed to the last moment, and now nothing very brilliant seems to be coming out of the typewriter. So, with apologies to some friends in Missouri who may have a feeling of déjà vu, here are some thoughts:

Arthur Ochs Sulzberger

A while ago I received a letter from an irate reader blasting our profession. She claimed that the press was a vast monolithic organization intent on subverting elected officials by publishing their past indiscretions. "Who elected the press?" the writer asked, and in so doing she less than obliquely suggested that our actions, if not un-American, were, at best, unpatriotic.

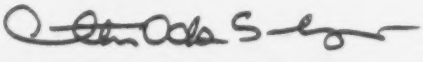
People have a funny idea about the press. Sometimes I can understand their confusion, as when ANPA filed an *amicus* brief supporting Hustler magazine in a remote but important First Amendment case. But most of the time we are what we are—some 1,500 independent news organizations, loosely bound together, sometimes through a corporate tie, but generally trying to report the news fairly and expounding our own editorial points of view on matters that strike our fancy. Some of us supported Bush, some Dukakis. Some of us would finance Star Wars and some would scrub it. Some of us are for a death penalty, and some are not . . . and on and on.

Indeed, this is the remarkable strength of the free American press, and it is what my writer and, unfortunately, lots of other writers and readers don't understand. They don't always see and feel the diversity of this great country as it is reflected in its newspapers.

Yet, while on the one hand we must spread the word of the independence of our press and its diversity of opinion, at the same time we must increasingly band together, as we do in ANPA, to share both common problems and common solutions. For none of us has either the time or the finances to single-handedly cover the news, protect our flanks and sell copies of our newspapers, all at the same time.

We are Americans with special powers and responsibilities—that the fearless editors and publishers who were our forebearers knew well—to tell the truth, as we know it, and to help alleviate scourges like bigotry, environmental rape and illiteracy.

Our challenge as journalists is to train the power of truth on these and other scourges, and as Americans to set an example in eradicating them.



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ANPA Executive Offices
The Newspaper Center, 11600 Sunrise Valley Drive, Reston, Va.
Mail address: Box 17407 Dulles Airport, Washington, D.C. 20041;
(703) 648-1000
FAX: (703) 620-4557

Advertising Sales Representatives

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Circulation Battles

Fast-growing North Carolina provides perfect setting for a study of burgeoning newspaper competition

BY SUSAN DENTE ROSS

A newspaper circulation battle is being waged with varying intensity in some surprising places across the United States—mid-size markets like the Research Triangle of North Carolina and, to a lesser extent, the Charlotte area.

"You're going to see some elbows flying in the areas outside the cities," says Elwood M. Wardlow, associate director of the American Press Institute in Reston, Va. "The big/little newspaper competition is emerging as more focused and determined. What you're seeing now is an intensified and more sophisticated outreach on the part of many metro dailies to suburban readers. . . . They view this not only as a step toward survival but as a step toward growth."

The turf fighting follows the retailers who follow the population, especially in fast-growing states like North Carolina, whose population of 6.5 million is the 10th largest among the 50 states. "The elegant enclaves outside of cities are filled with readers and consumers," says Richard R. Cole, dean of the University of North Carolina School of Journalism, Chapel Hill. "The suburban market is growing and becoming so much more affluent. The papers have to react to the demographics."

The demographics in the Research Triangle—demarcated by Chapel Hill in Orange County to the southwest, Durham in Durham County to the north and Raleigh in Wake County to the southeast—are mouthwatering. The Triangle boasts the highest median family income, nearly $37,000, in the state and the greatest concentration of Ph.D.s and engineers in the nation. It has been cited again and again as one of the nation's most booming, most liveable and most high-tech regions.

At its heart is the 6,700-acre Research Triangle Park, which includes more than 50 businesses employing in excess of 30,000 people. Drawing more than half of its work force from Wake County and another third from Durham County, the park has been a magnet for residential influx to what until recently was forested rural land.

"Suddenly there were hundreds of condominiums going up there with Durham addresses but no real attachment to Durham," says Frank A. Daniels Jr., publisher of The News and Observer and The Raleigh Times. Residents of the three cornerstone communities commute readily throughout the Triangle.

Overnight, a newspaper no man's land had become a marketing necessity.

"Durham wasn't particularly trying to get (these readers) but was getting them by default," Daniels says. "It was no longer economically feasible not to enter these markets. We have to have at least a 50-50 chance of getting those readers."

What really got publishers salivating, though, was the prediction that the area's population would double by 2005, with pastoral Orange County enjoying the bulk of that growth. "A lot of the competitive activity is based on that premise," says P. Lea Campbell Jr., publisher of The Chapel Hill Newspaper. "Chapel Hill itself is a very limited market at this point," he says, but "the metros (are in) a desperate struggle to hang on to the suburbs—to beat back the savage hordes of improved weeklies and community dailies."

THE CATALYST. In 1987, Ottaway Newspapers Inc. bought The Chapel Hill Newspaper and nearby weeklies in Fuquay-Varina and Apex. Within months, what had been a gentlemanly metro tug-of-war escalated into a raging free-for-all.

Campbell says Ottaway's arrival was "a catalyst for developing an accelerated competitive situation that would have happened

Comparative Circulations of Selected Newspapers in the Carolinas[1]

	1988		1983	
	Daily	Sunday	Daily	Sunday
Research Triangle				
The News and Observer (a.m.) and The Raleigh Times (p.m.)	164,375	185,562	163,894	169,525
Durham Morning Sun and Durham Herald (p.m.)	66,870	63,860	61,572	60,180
The Chapel Hill Newspaper (p.m.)	5,181	5,964	5,211	6,505
Charlotte Metro Area				
The Charlotte Observer (a.m.)	231,445	288,331	219,530*	250,638
The Herald, Rock Hill, S.C. (a.m.)	27,276	26,922	24,662	n/a
The Gazette, Gastonia (a.m.)	39,853	43,306	36,303	39,746
The Salisbury Post (p.m.)	25,159	25,287	25,093	24,990
The Concord Tribune (p.m.)	12,433	12,445	12,442	13,380
The Daily Independent, Kannapolis (p.m.)	11,272	12,110	13,371	14,630
The Enquirer-Journal, Monroe (p.m.)	12,664	13,589	12,221	12,587
Piedmont Triad				
Greensboro News & Record (a.m.)	112,583	126,655	108,087	116,177
Winston-Salem Journal (a.m.)	92,607	104,736	105,587*	96,458
High Point Enterprise (p.m.)	32,637	33,192	31,032	31,486

[1] ABC averages for 6 months ended Sept. 30, except for The Chapel Hill Newspaper, figures of which are publisher's statements for March 31, 1988, and Oct. 1, 1983

*Includes circulation of sister paper that suspended publication after 1983

Ross is a free-lance writer who lives in Durham, N.C., and teaches journalism at the University of North Carolina at Chapel Hill.

at some point. The metro buzzards circling Chapel Hill and considering The Chapel Hill Newspaper moribund got a little more anxious when they thought the carcass showed some signs of life."

Clearly the Dow Jones & Co. subsidiary had intruded into the Triangle's domain of family-owned media. Previously Durham Herald Co. and The News & Observer Publishing Co. had peaceably coexisted and prospered.

But newcomer Campbell had barely adjusted to the view from his office window when The News and Observer began targeted mailings of The Triangle Observer to 70,000 non-subscribing households in March 1988. The new weekly offered 12 pages of locally produced feature material and advertising in separate editions for each of the three Triangle counties.

The Triangle Observer sprang from "the clear indication from a lot of advertisers in Raleigh that they were looking more and more at the Triangle as one market," Daniels says. "Wake County represents 50 percent of the combined market . . . and it didn't make any sense not to cover the whole market. We want, in a mini-sense, to be what the Chicago Tribune is to the Chicago area."

Ottaway demonstrated its determination shortly thereafter. In May, The Chapel Hill Newspaper began distributing The Picture once a week to 24,000 non-subscribing Orange County households. In tandem, the two publications reach that entire county.

"Our niche is Chapel Hill, Orange County and the bedroom communities of Chapel Hill," Campbell says. "We are determined we will be a must-read for comprehensive local news for people who care about that area. . . . Our challenge is to attract people who have no allegiance, to be attractive to someone from Missouri, [and] to get our share of the retail base."

To complete the opening salvo, in June the Durham Morning Herald unveiled its Chapel Hill Herald, which is wrapped around the Herald every day of the week for Chapel Hill area subscribers and single-copy buyers. Circulation and revenue figures had made it "painfully obvious that we needed to do something, and we decided to do something unusual—to create their [Chapel Hill residents'] own newspaper," Publisher Richard J. Kaspar says.

The move helps the Durham Morning Herald increase penetration, Kaspar says. Chapel Hill is not exclusively the province of The Chapel Hill Newspaper, he says. "We are not a new presence; we've been daily in that market longer than [The Chapel Hill Newspaper] has."

Each of the combatants in the Triangle says its publication is progressing nicely while those of the competition are losing money hand over fist. But they all acknowledge that their struggle is aggravated by a plethora of secondary publications that splinter the retail base. The Village Advocate, a Chapel Hill shopper, appears to have captured the lion's share of Chapel Hill advertising. The Daily Tar Heel, the university's student newspaper, is improving its position.

The Chapel Hill Newspaper admits to battle fatigue. It is "fighting very, very hard to recover some of the advertising base that has eroded over the past several years," Campbell says. "It is indeed a dogfight. All the competitors are well-resourced."

A comparison of the products indicates a tight battle. On Thursday, Dec. 1, The Chapel Hill Newspaper contained 14 pages and slightly more than 250 inches of paid display advertising. At its recently reduced open rate, that would pull in $1,000.

In its 12 pages, the Chapel Hill Herald wraparound cornered 270 inches, for about $1,475 of revenue at the open rate.

Something less than half of the 260 inches of paid display advertising in the Orange County edition of The Triangle Observer came from the Chapel Hill or Durham markets. Again at the open rate, the local ads raised about $4,200.

> *"It is indeed a dogfight. All the competitors are well-resourced."*
>
> **P. Lea Campbell**
> **The Chapel Hill Newspaper**

Clearly, no one is getting rich quick—on increased advertising or circulation. Figures for the past five years show two of the three Triangle daily papers have nudged circulation up; the third is down. (See chart, facing page.)

CHARLOTTE, TRIAD. The conflict in The Research Triangle is one of redefined and overlapping markets. On a smaller scale, a circulation war has broken out around Charlotte, the largest city in the Carolinas. But in another heavily populated market in North Carolina—the so-called Piedmont Triad of Greensboro, High Point and Winston-Salem—things so far have been relatively quiet.

In Charlotte, 130 miles southwest of the capital of Raleigh, the metro market is sprawling over outlying communities. As that has happened, the supremacy of The Charlotte Observer as the lone a.m. daily in its primary market has been challenged.

For years the suburban dailies filled the p.m. slot with increasingly "better products in content and printing," says Observer Publisher Rolfe Neill. "Now they are changing their names and de-emphasizing the city of origination, trying to broaden their base in the same way we are trying to broaden ours, and everyone is looking to adjacent counties."

During the '80s, the Observer has pursued a strategy of improved service to the suburbs through more comprehensive Neighbors sections. It publishes a section for each of the six counties contiguous to Mecklenburg County, its home, and has "developed a sort of cafeteria of products so an advertiser can get anything from a single ZIP code to our entire readership through a multiplicity of products," Neill says. "The key to this is recognition that The Charlotte Observer is the underdog in every county except its own."

Almost half of the Observer's circulation lies outside Mecklenburg. Its household penetration in Mecklenburg is nearly 70 percent; in the other counties, it is closer to 10 or 20 percent.

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Yet the Observer has not always acted the role of the scrappy underdog. Instead it was "sort of blithely going along in the morning as we had been for over a hundred years," Neill says. "Then suddenly we see people deciding to put out a morning paper. Our response has been that we are going to meet any competitor in our time slot."

The first shot came in Rock Hill, S.C., some 25 miles south of Charlotte. Rock Hill lies in York County, which with the neighboring South Carolina counties of Lancaster and Chester makes up one of the wealthiest and fastest-growing areas in the Charlotte Metropolitan Statistical Area. The Observer is contesting Rock Hill's daily paper, The Herald, for readers and advertisers there.

In mid-July, in a dramatic increase from its thrice-weekly Neighbor tabloid, Charlotte introduced The York Observer as a daily community newspaper wrapped outside The Charlotte Observer. The Observer, a Knight-Ridder Inc. newspaper, is devoting significant resources and staff to the new publication, says Editor Richard A. Oppel. He says 28-30 editorial staffers work on The York Observer (including some desk personnel in Charlotte), twice the number previously deployed in York County.

The News & Observer Publishing Co. of Raleigh, which bought The Herald in 1985, shifted the Rock Hill paper to a.m. publication in response both to The Charlotte Observer's circulation gains on The Herald's home turf and to the general preference of many readers for a morning paper, says company President Daniels. The Herald converted its Saturday paper to the a.m. cycle in the fall of 1985, added a Sunday morning edition in March 1986, and went to weekday morning editions last Aug. 1.

"Our circulation is up since," Daniels says, "but our ad revenues are flat and our expenses are up. It's a very very difficult competition."

Herald Publisher Wayne T. Patrick says, "It's been interesting here ever since" the Observer made its incursion. "I think the consumer has seen escalating coverage by both papers." Patrick says The Herald has gained about 2,000 circulation to 29,000 weekdays since going a.m. (see chart, p. 28).

Competition also is heating up elsewhere in The Charlotte Observer's territory. In Gaston County, N.C., The Gazette of Gastonia recently shifted to morning publication. So Charlotte launched The Gaston Observer wraparound, a project personally directed by Publisher Neill, on Jan. 2.

Some see the Greensboro/High Point/Winston-Salem Triad, about 80 miles west of Raleigh, as another potential newspaper battleground, but slow growth and the loss of several key industries have marked the past decade. Thus the Triad population currently offers little of the dynamism of the exploding Research Triangle or Charlotte area that's so appealing to advertisers.

Even so, "all of the (Triad) newspapers have become more aggressive and innovative," says Robert D. Benson, president and publisher of the Greensboro News & Record. "If we are to grow, (we) have to introduce new products, segment our market, be a little more assertive."

Three years ago, "in response to expressions of mass retailers that they wanted a print ad medium that served the total Triad," Benson says, the News & Record introduced The Ledger, a 300,000-circulation publication delivered to every household in the Greensboro/High Point/Winston-Salem MSA plus the nearby city of Burlington. A year ago, however, the Landmark Communications Inc. newspaper lopped off The Ledger's largest edition in Winston-Salem's home county and another in outlying Alamance County to concentrate closer to home.

Many of the mass retailers did not buy the vehicle they had advocated. "It was beyond greater Greensboro that we had the difficulty," Benson says. "As a result of our challenge, most of the area newspapers made some significant improvement in their papers. Winston-Salem Journal introduced a network of neighborhood, very-local news and advertising publications."

Joseph C. Goodman, managing editor of the Winston-Salem daily, owned by Media General Inc., says "Our strategy has always been to consolidate our circulation in our natural market area."

The Ledger was an attempt by the News & Record "to be more aggressive, to break out of its natural territory," Goodman says. "My judgment is that they've failed. I have to assume they've learned that our markets haven't merged yet. Tampa/St. Pete this absolutely is not. It will happen, but it appears to be in the distant future."

The third daily in the Triad, the High Point Enterprise, is a family-owned operation that observers say appears to be content with publishing the Enterprise much as it has for 104 years.

In fact, no one in the Triad currently gives evidence of wanting to engage in an all-out newspaper slugfest. That is being left to others. "It seems to me it's total war in the (Research) Triangle," says Goodman.

"I think the competition's just deadly," comments Cole of the UNC J-school. "There was a certain amount of complacency here before, sure, but I hope the competition doesn't get so deadly it pushes someone out of business."

For now, as API's Wardlow says, each newspaper in the circulation war "is going to have to prove its worth every day." □

Consumption hits record

With a big boost in December, newsprint consumption by all U.S. users and by U.S. daily newspapers closed out 1988 at record levels, according to preliminary figures compiled by the ANPA Newsprint Department.

Consumption by all users increased 3.1 percent in December, compared with December 1987. For the year, all-user consumption was up 0.4 percent. U.S. dailies in December used 3.6 percent more newsprint than a year earlier, and for 1988 their use was 1.3-percent higher.

Inventories for newspapers in ANPA's statistical sample averaged 49 days' supply at the end of December, compared with 47 days in December 1987. Stocks of North American mills were up 50 percent.

Canadian mills operated at 98 percent of rated capacity in December and 99 percent for the year. The operating rates for U.S. mills were 100.6 percent and 97.8 percent, respectively.

Estimated consumption of all U.S. daily newspapers[1]

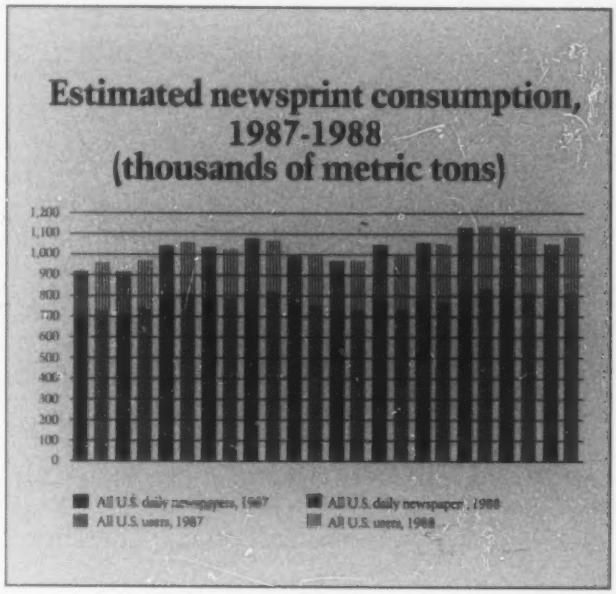
Region	October 1988(r)	October 1987	% Change
Northeast	218,150	215,880	+1.1
North Central	168,908	175,399	−3.7
South	255,366	250,887	+1.8
West	185,017	183,496	+0.8
Circulation Size			
up to 25,000	62,467	59,880	+4.3
25,001-100,000	175,632	164,847	+6.5
Over 100,000	589,342	600,935	−1.9
October totals	827,441	825,662	+0.2
Region	**November 1988**	**November 1987**	**% Change**
Northeast	201,776	215,704	−6.5
North Central	167,946	171,666	−2.2
South	254,228	258,744	−1.7
West	186,038	183,295	+1.5
Circulation Size			
up to 25,000	59,746	59,042	+1.2
25,001-100,000	178,557	166,660	+7.1
Over 100,000	571,685	603,707	−5.3
November totals	809,988	829,409	−2.3
Region	**December 1988(p)**	**December 1987**	**% Change**
Northeast	198,924	190,053	+4.7
North Central	168,418	162,084	+3.9
South	254,745	245,947	+3.6
West	184,348	180,522	+2.1
Circulation Size			
up to 25,000	59,562	58,081	+2.5
25,001-100,000	179,337	163,490	+10.0
Over 100,000	567,536	557,035	+1.9
December totals	806,435	778,606	+3.6
Twelve-month totals	9,246,178	9,124,666	+1.3

Estimated consumption of all U.S. users

	1988	1987	% Change
October totals	1,134,970(r)	1,129,066	+0.5(r)
November totals	1,089,719	1,134,375	−3.9
December totals	1,082,319(p)	1,049,980	+3.1(p)
Twelve-month totals	12,377,359(p)	12,322,953	+0.4(p)

Production

	Canada	U.S.A.	North America
November 1988	837,306	447,591	1,284,897
November 1987	812,077	437,436	1,249,513
Increase	+25,229	+10,155	+35,384
	+3.1%	+2.3%	+2.8%
December 1988	808,807	464,014	1,272,821
December 1987	779,403(r)	453,045	1,232,448(r)
Increase	+29,404	+10,969	+40,373
	+3.8%	+2.4%	+3.3%
Twelve months 1988	9,968,802	5,426,716	15,395,518
Twelve months 1987	9,668,893(r)	5,299,735	14,968,628(r)
Increase	+299,909	+126,981	+426,890
	+3.1%	+2.4%	+2.9%



Stocks

U.S. publishers[2]	Tonnage	Days' supply On hand	Days' supply In transit
October 1988	935,493(r)	37(r)	5
October 1987	897,438	33	6
November 1988	898,252	37	6
November 1987	866,190	35	7
December 1988	918,331(p)	42(p)	7(p)
December 1987	900,315	39	8
Canadian mills			
November 1988	355,953		
November 1987	297,585		
December 1988	290,488		
December 1987	189,095		
U.S. mills			
November 1988	58,559		
November 1987	46,146		
December 1988	48,093		
December 1987	36,131		

Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
November 1988	585,148	112,817	146,962	844,927
November 1987	597,171	108,955	94,711	800,837
December 1988	610,177	101,196	162,899	874,272
December 1987	623,428	110,951	153,514(r)	887,893(r)
Twelve months 1988	7,086,779	1,227,069	1,553,561	9,867,409
Twelve months 1987	7,086,688	1,183,142	1,487,172(r)	9,757,002(r)
Increase	+91	+43,927	+66,389	+110,407
	+0.001%	+3.7%	+4.5%	+1.1%
From U.S. mills				
November 1988	416,837		38,792	455,629
November 1987	412,181		26,941	439,122
December 1988	436,133		38,347	474,480
December 1987	442,595		17,976	460,571
Twelve months 1988	5,033,330		381,424	5,414,754
Twelve months 1987	5,026,081		284,108	5,310,189
Increase	+7,249		+97,316	+104,565
	+0.1%		+34.3%	+2.0%
From North American mills				
Twelve months 1988	12,120,109	1,227,069	1,934,985	15,282,163
Twelve months 1987	12,112,769	1,183,142	1,771,280(r)	15,067,191(r)
Increase	+7,340	+43,927	+163,705	+214,972
	+0.06%	+3.7%	+9.2%	+1.4%

[1]Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2]Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary